



**State of Wisconsin**  
**Department of Administration**

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**Creating and Using Speedcharts**  
**Job Aid**

**Version 1.0**

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## PURPOSE AND DESCRIPTION

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### Purpose

This Job Aid is designed to help you in General Voucher Processing. It provides an overview of the sub-processes involved, as well as step-by-step procedural guidance to perform the activity.

### Description

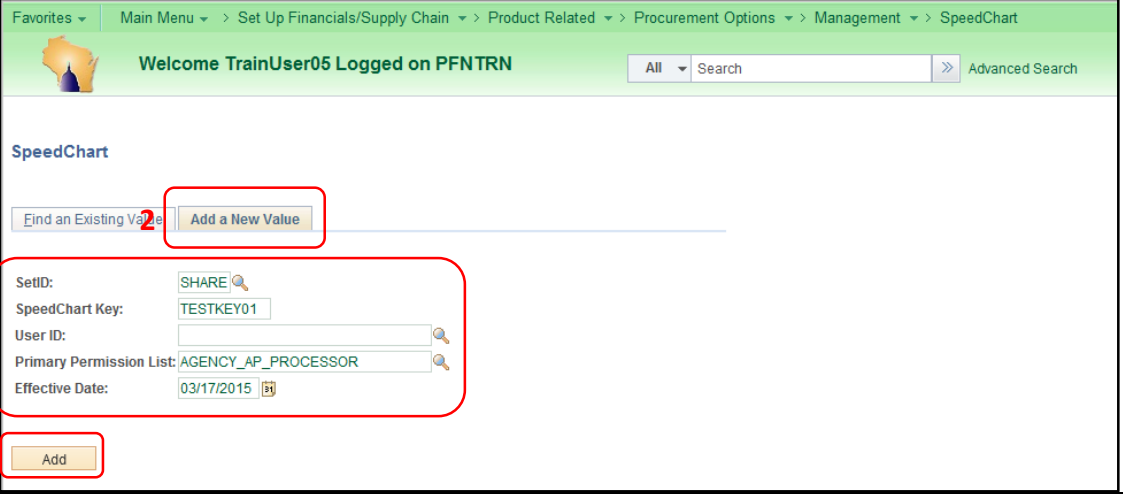
The key activity involved with general voucher processing is creating and using Speedcharts. The creating and using SpeedCharts process is used to decrease time entering Distribution Information on a Voucher. The user can select the SpeedChart from the Voucher Entry page, which will then automatically populate the Distribution Information on the transaction instead of having to populate each individual field manually.

## CREATING SPEEDCHARTS PROCESS STEPS

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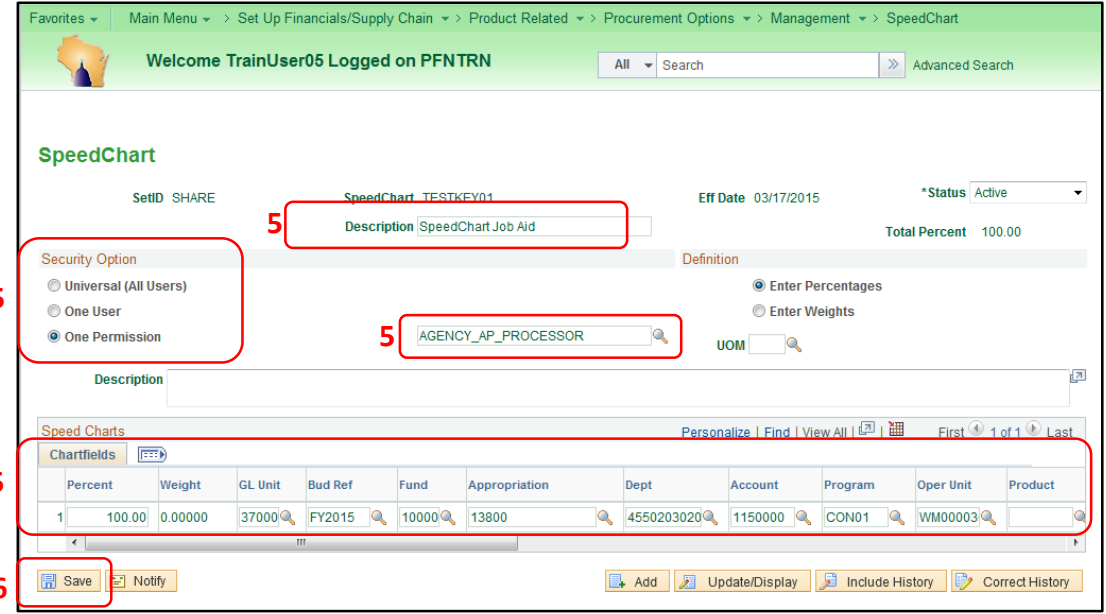
Step	Action
1.	Navigate to the SpeedCharts page: <b>Main Menu &gt; Set Up Financials/Supply Chain &gt; Product Related &gt; Procurement Options &gt; Management &gt; SpeedChart</b>
2.	The SpeedChart page will be displayed. To create a new SpeedChart, ensure the <b>Add a New Value</b> tab is selected.
3.	Complete the following fields: <ul style="list-style-type: none"><li>• <b>SetID:</b> The SetID identifies which group of Business Units/Functional Modules the SpeedChart will apply to.</li><li>• <b>SpeedChart Key:</b> The SpeedChart Key identifies the SpeedChart. The SpeedChart Key may contain up to 10 characters and should be recognizable to the user.</li><li>• <b>Effective Date:</b> The Effective Date is the date the SpeedChart will be available for use on different transactions.</li></ul>

4. Select **Add**.



5. Complete the following fields:

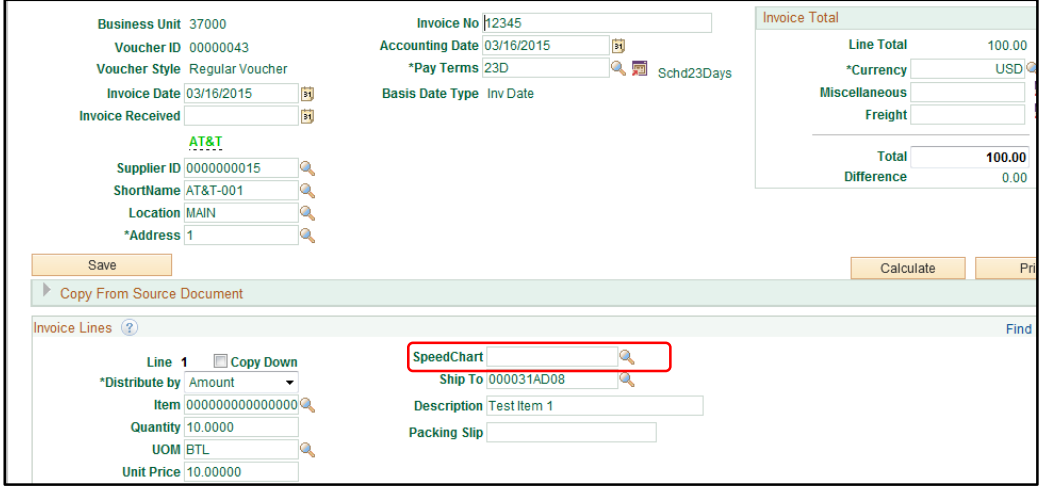
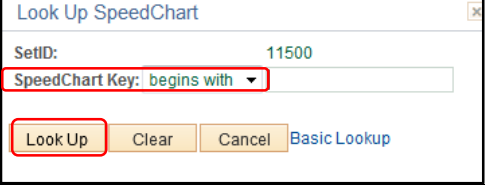
- Description:** The SpeedChart description is used to help identify the SpeedChart when it is added to a transaction.
- Security Options:** Select the users who will have access to the SpeedChart. Access can be granted to one of the following options: All Users, One User, or One Permission. For One User, the current **User ID** is assigned. For One Permission, a **Primary Position List** is assigned by the user.
- SpeedChart ChartField values:** The ChartField values selected represent the ChartString for which the user is making the SpeedChart.



**Note:** Use the **Percent** field to assign multiple ChartString values. The sum of all percentages must total 100 before the SpeedChart can be applied.

6.	Select <b>Save</b> .
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## USING SPEEDCHARTS PROCESS STEPS

Step	Action
1.	Navigate to the SpeedCharts page: <b>Main Menu &gt; Accounts Payable &gt; Vouchers &gt; Add/Update &gt; Regular Entry</b>
2.	To apply a SpeedChart to an existing voucher, select the <b>Find an Existing Value</b> tab and search for the voucher. To apply a SpeedChart to a new voucher, select the <b>Add a New Value</b> tab and create a new voucher.
3.	After the voucher has been selected or added, select the <b>Invoice Information</b> tab.
4.	In the <b>Invoice Lines</b> section, search the <b>SpeedChart</b> field by clicking on the magnifying glass. 
5.	Enter the <b>SpeedChart</b> key in the appropriate field and select <b>Lookup</b> . 
6.	Select the SpeedChart key from the list of Search Results.
7.	The distribution information is populated in the <b>Distribution Lines</b> section with the information saved in the SpeedChart.



Distribution Lines											Personalize   Find   View All   <span>421</span>
GL Chart   Exchange Rate   Statistics   Assets   <span>...</span>											
	Copy Down	Line	Merchandise Amt	Quantity	*GL Unit	Bud Ref	Fund	Appropriation	Dept	Account	P
<span>+</span>	<span>-</span>	<span>...</span>	1	0.00		37000	FY2015	10000	44100	3700000000	7500000

Save
Save For Later